- **Finance and Administration Strategy**
  - Vision, Mission and Core Values
  - Balanced Scorecard Objectives

- **2012-2013 Key Initiatives**

- **Your questions**

- Strategic Review – October 2011
- Finalize Strategy – Jan 2012
- Coffee Hour – Feb 1, 2012
- 2012-2013 Planning Process
Working collaboratively, embracing new technologies and innovative ways of operating, we will provide best-in-class service to the Carleton Community.
We support Carleton’s academic mission of teaching, research, and community service by providing administrative and other support services that are effective, efficient, and timely.
Core Values

- **Service Excellence**
  We meet customer needs through professional, responsive, reliable, and courteous service.

- **Continuous Improvement**
  We challenge the status quo with innovative work processes and practices.

- **Inclusive Decision Making**
  We collaborate in making evidence-based, timely and effective decisions.

- **Safe, Healthy, and Sustainable Environment**
  We foster a positive work environment.

- **Employee Engagement**
  We value, respect, recognize, and support our employees.

- **Accountability**
  We are accountable for what we do and how we do it.
- Provide quality, responsive and helpful services
- Understand customer needs and anticipate future requirements
- Foster a culture of Service Excellence
- Provide a safe and respectful campus
Provide effective stewardship of university resources

Manage risks that affect the university
Utilize effective strategic and operational planning in support of the academic, research, and administrative enterprise

Work collaboratively

Continuously improve our processes and services in an efficient and effective manner
Our Employees

- Provide a safe, healthy, respectful, and supportive work environment
- Develop a culture of continuous learning
- Recognize and engage employees in their work
- Develop leadership capabilities
Key Initiatives for 2012-2013

Our Customers
- Continue to support Service Excellence;
- Continue to assess Customer Satisfaction.

Stewardship of Resources
- Communicate “Not Business As Usual”;
- Explore Solutions to Pension Funding;
- Capital Program - Additions – Alumni Hall, INCO, Library
  - Backfill Renovations
- Explore Development of North Campus (18 acres);
- IT Program – LMS, Mobile Apps, Cloud Email for students, Banner Document Management System;
- Enhance Operational Sustainability Activities.
Key Initiatives 2012-2013

The Way We Work

- Renew Emergency Management and Business Continuity Framework;
- Support Improvement Projects, Lean, Benchmarking, Process Management;
- Develop IT Strategic Plan;
- Develop HR Strategic Plan;
- Develop EH&S Strategic Plan.

Our Employees

- Support Staff Learning and Development renewal;
- Support Healthy Workplace Implementation;
- Support Quality Journey PEP Level 2 preparation.
✓ Departments and units complete 2012-2013 plan (February/March 2012)

✓ Budget meetings (March)

✓ Board approval of both operating and ancillary budgets (April)

✓ Plans are refined based on budget approval (April)

✓ Plans are shared with staff (April/May)

✓ Plans monitored throughout the year
Questions